

5 WHAT IS CLAIMED IS:

1. A method for managing customer relationships which utilizes a global information network, administered by a proprietor for a plurality of producers, the method comprising:

- 10 a. the proprietor providing a global information network;
- b. each producer providing a customer database in communication with the proprietor's global information network;
- c. the proprietor organizing the information to be sent to selected customers of each producer; and
- d. the proprietor sending the organized information to each producer for approval; and
- e. the proprietor utilizing software to send the information to selected customers of a producer.

20 2. The method of claim 1 in which the producer is an insurance professional.

3. The method of claim 1 in which the producer is a financial professional.

4. The method of claim 1 in which the global information network includes an email link to the customers to whom the organized information is sent by email.

25 5. The method of claim 1 in which the proprietor's software includes the capability of sending the information

by email or U.S. mail according to the preference of the customer to whom the organized information is sent by email or U.S. mail at the customer's preference.

6. The method of claim 1 in which the producer database is stored in a central database of the proprietor.

7. The method of claim 6 in which the central database also stores specific records of the producer including tables, letterhead, newsletters, logos and form letters.

8. The method of claim 6 in which each producer has the capability of accessing records of his customers in the central database to edit, add or delete the customer records of this producer.

9. The method of claim 1 in which the proprietor's software has the capability to personalize the organized information by including a personal greeting to the customer and the producer's address and name to indicate that the information originates with the producer and the method performs this operation.

10. The method of claim 1 further comprising the step of providing quality assurance protocols which comply with Mil45208 standards with periodic audits to assure compliance with the same.

11. The method of claim 1 further comprising the step of providing quality assurance protocols which comply with

5 Mil9558 standards with periodic audits to assurance
compliance with the same.

12. The method of claim 1 in which the proprietor provides
a website for the producer which can be accessed by a
customer of the producer who received the organized
10 information.

13. The method of claim 1 in which the information being
sent is a message about an event happening to the customer
with the event information being included in the customer
database with the event being processed by the proprietor's
software for sending to the customer having the event at
the appropriate time in advance of the happening of the
event.

14. The method of claim 13 in which the information being
sent is further personalized with a photograph of the
producer.

15. The method of claim 6 in which the producer's customer
database is protected from access by others by requiring a
login name and password known only to the producer.

16. The method of claim 1 in which the proprietor utilizes
25 a global information network and provides an application
server in communication with the global information network
and creates a central database in communication with the
applications server in which customer records from a

5 plurality of producers are stored in the central database.

17. The method in claim 6 in which the central database is automatically scanned, at predetermined times, to determine due events from each customer's records of a producer and sending a appropriate message to such customer about an event happening at the appropriate time in the advance of the event happening.

18. The method of claim 6 further comprising the step of checking each added customer record by a particular one of the producers for duplication with customer records with records in the central database, and, if an existing customer record is found, deleting the new customer record and indexing the existing customer record to the original producer.

19. The method of claim 17 further comprising the step of creating an individual letter at one of the plurality of producers, transferring the letter to the central database and generating and mailing the individual letter on the next automatic scanning.

20. A method for managing customer relationships which utilizes a global information network, the method comprising the steps of:

- a. providing an applications server with a communication with a global information network;

- b. creating a central database in communication with the applications server;
- c. storing customer records from a plurality of producers in the central database, each customer record from one of the plurality of producers being indexed to the one of said plurality of producers;
- d. providing a browser based customer relations management model having a secured administration program permitting a particular one of a plurality of producers to access, edit and add the customer record indexed to a particular one of the plurality producers;
- e. the proprietor organizing the information to be sent to selected customers of the producer; and
- f. the producer sending the organized information to the producer for approval; and
- g. the proprietor using software to send the information to selected customers of a producer.

21. An apparatus for managing customer relationships, which utilizes a global information network, the apparatus comprising:

- a. an application server in communication with a global information network, the applications server having a central database in communication therewith, the

- 5 central database having customer records from a
plurality of producers stored therein, each customer
record from one of the plurality of producers being
indexed to one of said plurality of producers;
- 10 b. a browser based customer relations management module
having a secured administration program permitting a
particular one of the plurality of producers to
access, edit and add the customer records indexed to a
particular one of the plurality of producers;
- c. a mail bulking software mechanism for automatically
scanning, at predetermined times, the central database
to determine due events for each customer record, the
mail bulking software mechanism associating with each
due event the specific records from the particular one
to the plurality of producers indexed to the customer
record associated with the due event, the mail bulking
software mechanism generating files for bulk printing
based on the due event associated with one of the
customer records indexed to one of the specific
records; and
- 25 d. a targeted software module having software tools, each
of the software tools being targeted at a particular
category of the plurality of producers.
22. The apparatus of claim 21 wherein the browser based

5 customer relations management module checks each added
customer record by a particular one of the plurality of
producers for duplication with the customer records in the
central database, and, if an existing customer record is
found, deletes the new customer record and indexes the
10 existing customer record to the one of the plurality of
producers.

23. The apparatus of claim 21 wherein the browser based
customer relations management module standardizes an
address format associated with each of the customer
records.

24. The apparatus of claim 21 wherein the browser based
customer relations management module allows the one of the
plurality of producers to create an individual letter and
transfer the letter to the central database, the mail
bulking software mechanism thereafter generating and
mailing the individual letter on the next automatic
scanning.

25. The apparatus of claim 21 in which the global
information network includes the capability of sending the
information to a customer by email or U.S. mail according
to the preference of the customer.

26. The apparatus of claim 21 in which software is
included which has the capability to personalize the

5 organized information that is being sent to a customer by
including a personal greeting to the customer and the
address and name of a third party to indicate that the
information originates with the third party.

10

2005-12-20 23:03:00

25